



**School Building Authority of West Virginia**  
**David A. Sneed, Executive Director**

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2300 Kanawha Boulevard, East • Charleston, West Virginia 25311-2306 • Office (304) 558-2541 • Fax (304) 558-2539

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**MEMORANDUM**

**To:** Members of the School Building Authority

**From:** David A. Sneed, Executive Director

**Subject:** Agency Reorganization

**Date:** September 28, 2015

With the changes in the project development, planning and construction administration moving forward this action will require changes in the daily operations of the agency. We are in the process of reassigning duties within the architectural services staff and we will be assigning additional duties for all of the current staff as the new policy is approved. I have discussed this reality with the staff and everyone is ready to meet this challenge. Currently the Authority has over \$300,000,000 dollars in active projects. Based on our cooperative efforts working with the counties on their 2016 Major Needs and MIP projects, the staff feels there is going to be a greater number of **very high quality** projects submitted this year and hopefully a significant local funding effort to compliment SBA funding as well. Several projects will be closing out over the next several months but we anticipate new project amounts to exceed those closing out this fall. As a result, the active project dollar amount should exceed \$400,000,000 next year. We also predict a minimum of \$300,000,000 of additional funding over the next 3 years with approximately 50% of those funds being SBA participation.

Moving forward we have informed the Governor and the Authority that we would make every effort to reduce costs including the cost to administer the program. I am pleased to inform you that we have reduced the operating cost for Fiscal Year 2016 by 7%. Recent policy approvals by the Authority will also provide the opportunity to increase efficiencies and help control construction costs as the SBA moves forward.

To date we have provided a broad-brush overview of how the agency will function in the future and the Authority has provided support for our recommendations by way of directives and policy revision approvals. In order for these policies to be carried out effectively, we will be making formal changes to the staff's current job responsibilities and will be establishing job performance standards that will be measured by annual job performance evaluations. The following logistical changes will be occurring as we move forward.

## **EARLY INVOLVEMENT OF STAFF IN PROJECT DEVELOPMENT**

As requested by the Authority the staff of the SBA is taking a more active role in project development, planning and construction administration. The staff has already begun working with the counties on their upcoming project submissions and is excited about the projects that will be coming before the Authority this year. As we have been meeting with the counties our goal has been to:

- Address the greatest school needs within the county and state
- Spend state dollars on projects that provide the greatest benefits to the counties
- Construct quality schools in an effective and efficient manner
- Provide the highest level of oversight and accountability possible

The technical support the staff is providing over the past few months has been well received by all counties. As we meet with each County's Superintendent and Board of Education, we have had very productive conversations regarding the short and long-range goals the counties are attempting to address and the SBA will be able to support. We are also discussing a variety of financing options that include SBA, local bonding, local capital levy funding, local capital improvement, private, QZAB and QECB that will be available to a few counties in the near future. County Boards have also been provided firsthand knowledge of the amount of funding the SBA will have available in upcoming cycles and how it might best position themselves to receive funding based on the financing plan we can mutually agree upon should the Authority fund their project. This cooperative pre-submission activity has been very productive and we are confident the Authority will begin to see improvements in the quality of future projects.

## **REVISED STAFF RESPONSIBILITIES**

The School Building Authority of West Virginia has always provided considerable services to the county school systems but has managed to keep operating expenses at 1% or lower of the total dollars appropriated annually for the program. The Authority's recent actions have directed the staff of the SBA to increase its involvement with project development and management. We are creating a matrix for the staff's responsibilities that will define everyone's role and identify specific responsibilities from the project inception stage to the project closeout stage. To accomplish this we do not anticipate any additional costs beyond our current budget allocation nor do we feel the need for additional staff to perform these additional services in the future. This format will provide the Agency greater control over the scope of each project as well as the budgets moving forward. During the August 2014, work session the staff provided a working plan for the future of funding school construction that included investigating all possible

funding sources available to our state as well as a plan to increase funding available for more projects by reducing costs.

The staff is making significant changes in the operations of the agency and increasing job responsibilities for most. The greatest changes will occur in the Architectural Services Division but this will require the Finance staff to accept additional responsibilities as we move contracted work in-house and we take a more active role in the development and management of future projects. This new direction also begins to set in place in-house oversight of projects recommended in the Governor's Educational Performance Audit prepared for the West Virginia Department of Education and The School Building Authority in 2012. I have revised the current staff's job descriptions to reflect their added or revised responsibilities in the future. We are also proposing job title changes for the architectural services assistant directors that reflect the revised roles within the agency. The individuals performing the educational planning will have their job titles changed to Assistant Directors of Educational Planning and the individuals performing the construction administration will become Assistant Directors of Construction Administration. The new job descriptions will, however, be multi-categorical and allow flexibility for these staff members to perform other duties as assigned by the Director of Architectural Services or the Executive Director.

In the past, each member of the architectural service staff performed the same services with the counties being divided among the four staff members and each staff member having a similar number of counties assigned to service. Since we are now becoming more involved in the project development and construction administration we are assigning all architectural service staff members to assisting the counties with project development but two staff members will specialize in and assist counties with preparing educational specifications for specific projects and two staff members will provide oversight of the construction administration. Ben Ashley and Joyce VanGilder will be providing services during the educational planning phases as these responsibilities best reflects their experience and educational background. Mike Hall and Dana Womack will work closely with Joyce and Ben to insure the educational requirements are incorporated into the design and construction but there primary focus will be oversight of the construction process. Mike and Dana have a number of years of experience in construction and construction administration and these responsibilities also best reflect their previous education and experience.

Once the final policies are approved, the staff is prepared to move forward with the revised duties and responsibilities. This represents the next step necessary to improve the quality of projects coming before the Authority for funding and the management of these projects once funding occurs. This also sets in place the infrastructure to address the goals and objectives for the agency that were presented first to Governor Tomblin and later to the Authority during our August 2014 work session and the September 2015 Authority meeting.

## **EMPLOYEE EVALUATION AND STAFF DEVELOPMENT**

Our research indicates that other state and county agencies already perform employee evaluation; I feel that there is need in our agency to acknowledge work performances each year. As responsibilities increase, accountabilities should also increase. The School Building Authority has never had an active employee evaluation process in place and without having a formal evaluation process, employee growth is hampered and a true measure of the value of each employee is not quantifiable. I would like to create an employee evaluation process and begin using annual staff evaluations in 2016. This would allow the staff time to adapt to their new responsibilities, allow sufficient time to understand their work performance has value and to realize their body of work is being evaluated with the result being recommendations for continued growth or the need for improvement. While we would not expect documentation of negative performance to lead to a recommendation for termination to be an issue, this document could serve as the basis for termination of employees that show a continued pattern of poor work performance.

I firmly believe that public agencies should allow for individual growth among staff members that are performing similar duties but incentives are necessary for meritorious work to be performed. Each employee brings unique skills and training to the agency. We will require continuing education and certifications for employees performing duties that require special skills. Moving forward the staff will need educational planning skills, critical path schedule training, project management skills and a clear understanding of contract documents and each design and construction members responsibilities within these documents. More importantly, we will need to understand the SBA's responsibilities and liabilities within the contract limits. We have already begun our continuing education for several staff members and once the new policy is approved, we will schedule additional continuing education for all staff immediately.

## **JOB DESCRIPTIONS**

### **DIRECTOR OF ~~ARCHITECTURAL SERVICES~~ SCHOOL PLANNING AND CONSTRUCTION**

**ADMINISTRATIVE UNIT:** School Building Authority of WV

#### **NATURE OF WORK:**

Under general supervision of the Executive Director, the Director of ~~Architectural Services~~ Planning and Construction supervises the planning, design and construction services of the School Building Authority. The individual provides technical knowledge and experience to the agency with regards to the design and construction industry; works with the industry leaders including architects and contractors to coordinate design and construction matters that are vital to the success of the West Virginia capital school improvement program; supervises the architectural services staff consisting of four Assistant Directors of Planning and Construction, and technical assistants that oversee school planning, design, programming and construction supervision; manages all phases of the project planning and development and provides recommendations to the Executive Director and members of the School Building Authority Board for project funding consideration. This individual will create policy relating to planning, design and construction services provided by the agency; oversees the long range planning process used to assist local boards of education in the creation of Comprehensive Educational Facilities Plans (CEFP) and after reviewing recommends approval of all county and state agency CEFP's; reviews and approves all correspondence sent from the office relating to project management and maintains library of all plans, specifications and complete project records for all schools funded by the SBA. The Director of ~~Architectural Services~~ School Planning and Construction also acts as a liaison between the SBA and the design and construction industry.

#### **EXPECTATIONS:**

- The staff member works effectively as a member of the administrative team and is responsible for the ~~Architectural Services~~ School Planning and Construction Division of the SBA.
- The staff member demonstrates self-control and exhibits an attitude of mutual respect.
- The staff member maintains and creates new policy and procedures relating to planning, design and construction of public schools and presents policy change recommendations to the Executive Director and to the School Building authority members.
- The staff member is ethical and demonstrates good work habits.
- The staff member demonstrates an ability to work effectively with county personnel, SBA board members and legislative leaders.

#### **PROFESSIONAL DUTIES:**

- Responsible for approving the design plans and coordinating the activities required to assure that the projects identified by the SBA for funding meet the requirements of the Authority and the State Board of Education.

- Assures that data and reports regarding the projects are produced in an accurate, timely and efficient manner.
- Maintains a computerized record of project status.
- Provides leadership and technical assistance to county boards of education and other agencies in developing facility plans and administration of construction projects.
- Responsible for coordinating and supervising all the activities relating to the School Building Authority construction program.
- Performs administrative duties as assigned by the Executive Director.
- Creates and maintains Building Information Modeling (BIM) requirements of the Authority.
- Supervises all educational planning and construction services performed by the Assistant Directors of School Planning and Construction.
- Identify, assign and coordinate the services of the construction analyst or construction managers assigned to SBA projects.
- Prepares all design and construction requirements as seamless documents that are coordinated within the project development, planning and construction disciplines.

## **QUALIFICATIONS:**

### **Required:**

- Bachelor's degree in architecture or related field and eight years of experience in school plant planning; or an associate degree in related field with 15 years of experience in school design and school plant planning.
- Recognized educational facilities planner (REFP) and certification from the Council of Educational Facilities Planners International (CEFPI).
- Working knowledge of PC software, design and project management software related to school design and maintenance of records
- Eight years of experience in construction oversight
- Clear and effective oral and written communication skills

### **Desired:**

- Eight years of experience in school planning and design with direct experience with School Building Authority Policies and Procedures
- Experience working within an architectural/engineering firm in the planning, design and construction of school facilities
- Experience in writing public policy for managing school planning and construction projects

**ASSISTANT DIRECTOR – ~~ARCHITECTURAL SERVICES~~**  
**SCHOOL PLANNING AND CONSTRUCTION**

**ADMINISTRATIVE UNIT:** School Building Authority of WV

**EXPECTATIONS:**

- The staff member works effectively as a member of an administrative team
- The staff member demonstrates self-control and exhibits an attitude of mutual respect
- The staff member is ethical and demonstrates good work habits
- The staff member demonstrates an ability to work effectively with county personnel, design professionals and the construction industry
- The staff member demonstrates a working knowledge of the American Institute of Architects project documents
- The staff member represents the SBA and communicates the policies of the SBA as directed by the Executive Director and the ~~Chief~~ Director of Architectural Services in school planning and construction venues
- Participates in continuing education to ensure job performance and maintains certification necessary to perform job duties assigned

**DUTIES:**

- Responsible for reviewing the design plans and assisting with coordinating the activities required to assure that the projects identified by the SBA for funding meet the requirements of the Authority
- Reviews data and reports regarding the projects submitted by the county boards or consulting professionals for accuracy and reports on project status
- Provides technical assistance to county boards of education ~~in developing facility plans~~ with administration of construction projects
- Travel to construction sites for on-site inspections, project meetings and reviews
- Performs administrative duties as assigned by the Chief Director of Architectural Services
- Responsible for the establishment of the education planning process for individual projects
- Coordinate project phasing efforts with the County Boards of Education and Construction Analyst/Construction Manager
- Provide occupancy reviews and approvals to County Boards of Education at the conclusion of all projects
- Assist County Boards of Education in developing effective and efficient long range educational facilities plans
- Assist County Boards of Education with assembling the documentation required to be submitted to the Authority in order to request funding for a specific project
- Works closely with the County Boards of Education, their planning committees and community members to develop educational specifications for new and existing facilities, where School Building Authority funds are utilized

- Oversee the activities of the Construction Analyst or Construction Manager as assigned to projects
- Works in conjunction with Construction Managers or other project management teams, as assigned by the Authority, to develop and maintain project budgets and schedules through the duration of the project
- Evaluate and provide technical data to County Boards of Education with regards to projects submitted to the Authority for funding consideration
- Reviews and has sign-off authority for construction pay requests from prime contractors
- Reviews and has sign-off authority for construction change orders
- Provide technical expertise to the project design and construction management team regarding alternative and less costly alternatives for construction

## **QUALIFICATIONS:**

### **Required:**

- Bachelor's degree in architecture or related field and eight (8) years' experience in school plant planning; or related experience in the field may be substituted on a year-for-year basis for the required degree.
- Working knowledge of construction specifications and previous supervision of major construction projects
- Working knowledge of PC software, communications and operations related to school design and maintenance of records
- Clear and effective oral and written communication skills
- Ability to use project management software

### **Desired:**

- Ten (10) years' experience as a school plant planner, preferably in an architectural or school planning firm or local county board of education setting
- Experience with an architectural firm in all phases of the planning, design and construction of school facilities
- Working knowledge of written construction specifications
- Knowledge of effective and efficient construction techniques
- Registered Architect in the State of West Virginia
- Knowledge of SBA legislation and guidelines
- Experience in supervision of major construction projects
- Knowledge of Construction Path Scheduling Method (CPM)
- Knowledge and experience with Building Information Modeling



## **TECHNICAL ASSISTANT SENIOR**

**ADMINISTRATIVE UNIT:** School Building Authority of WV

### **NATURE OF WORK:**

This employee will work for the School Building Authority of WV (SBA) and the Director of School Planning and Construction. This employee will perform advanced technical work in the area of school facilities planning and construction, as well as the allocation and expenditure of SBA funds. Under limited supervision, the employee may be responsible for providing both clerical and administrative functions. Work will involve the ability to work independently with limited direction. Work must be provided in strict confidence and in accordance with modern professional administrative principles. Technical work and data interpretation duties are predominant with clerical duties being secondary. In addition, the employee will work on an as-needed basis with the Finance Division and the Executive Director of the SBA. The employee will report to the Chief of Architectural Services, but will assist other division directors as necessary.

### **DUTIES:**

- Provide technical assistance to state and county officials in school planning and construction administration
- Work with SBA historical and active data to monitor trends and develop relevant statistics
- Compile and maintain records necessary for the projecting of data for the WV Legislature, other SBA staff and other state agencies
- Assist with policy and document development and revisions
- Verify and analyze data reports for completeness and accuracy
- Provide administrative and clerical support to all ~~Architectural~~ Assistant Directors of School Planning and Construction staff members
- Create documents in Microsoft Office and its related software including the creation of complex tables, charts and graphs
- Learn major responsibilities of other support personnel and provide assistance during absences or times of a heavy workload
- Attend planning meetings as needed with Assistant Directors of School Planning and Construction and Boards of Educations to assist with documentation of meeting minutes
- Compile data from project planning meetings and assist with development of long range facilities plans and educational specifications
- Work with design professionals and construction industry professionals to coordinate, establish and maintain project bidding schedules
- Create agendas for project planning meetings and Authority construction committee meetings, as well as compile information required for related agenda attachment items
- Prepares construction committee meeting minutes and distributes meeting minutes

- Coordinates and assembles educational planning documents as they are created by Assistant Directors of School Planning and Construction and communicates information to County Boards of Education and Design and Construction Management Teams

#### **EXPECTATIONS:**

- Work effectively as a member of an organizational team
- Demonstrate self-control and exhibit an attitude of mutual respect
- Demonstrate ethical behavior and good work habits
- Demonstrate the ability to communicate effectively with the public including County Superintendents, Board of Education members and the general public

#### **QUALIFICATIONS:**

- High School diploma or equivalent
- 5 years' experience as a full-time paid employee in school planning, account or related field
- Typing at 50 wpm
- Strong oral and written communication skills
- Strong analytical and mathematical skills
- Dependability and personal initiative
- Ability to work under pressure and tight time lines
- Ability to organize and perform multiple assignments
- Strong computer skills including a working knowledge of Microsoft Office
- Willingness to work occasional overtime
- Demonstrate exceptional work habits and attendance record
- Strong sense of cooperation and hospitality

#### **PREFERRED:**

- Advanced training (college or other) in a job related field

## **DIRECTOR OF ADMINISTRATION**

### **NATURE OF WORK:**

Under general supervision of the Director of Finance this individual performs professional and administrative work functions of the School Building Authority. This includes the daily operation and internal control relating to expenditure and appropriation request preparation, purchasing, accounts payable, investment of funds, management of expenditures and all personnel related functions. This individual will interact with government officials, including the Governor's Office, state agencies and the general public. This individual will also be responsible and work directly with the Director of Finance for the processing of any Federal funds. In the absence of the Director of Finance, this employee will report to the Executive Director.

### **EXPECTATIONS:**

- The staff member works effectively as a member of the administrative team.
- The staff member demonstrates self-control and exhibits an attitude of mutual respect.
- The staff member is ethical and demonstrates good work habits.
- The staff member demonstrates the ability to work with state agencies, vendors, School Building Authority members and legislative leaders.

### **PROFESSIONAL DUTIES:**

- Ensure timely payment of agency debt service payments
- Develop SBA Operating Budget and prepare Expenditure Schedules and Appropriation Requests for the State Budget Office.
- Create and maintain office expenditure reports for the SBA.
- Oversee and have responsibility for the purchasing functions of the SBA including contract and price negotiations.
- Obtain bids and quotes for goods and services and ensuring compliance with specifications and fair and equal bid evaluation.
- Oversee and approve the accounts payable functions of the SBA ensuring proper documentation and timely invoice payment.
- Review and process SBA payroll.
- Drawdown/deposit money for the SBA operating budget from the Trustee.
- Coordinate and monitor the State Purchasing Card Program for the SBA including training and dissemination of new policy statements.
- Oversee the operations of the SBA Office.
- Work with State agencies regarding human resources issues for the SBA staff including PEIA, Teacher's Retirement and the State Budget Office.
- Assist in the hiring process for new staff for the SBA including reviewing applications, creating interview questions and participating in interviews.
- Record and report annual and sick leave for the SBA staff.

- Oversee Inventory Management including mandatory inventory reporting, tracking fixed assets and evaluating requests for new office and computer equipment.
- Oversee office supply inventory and making orders when appropriate to maintain sufficient amounts of needed supplies.
- Monitor cash deposits made by the Tax Division for the Pay-as-You-Go funding system and ensure investment of funds each month.
- Communicate with Bond trustees and/or related parties to ensure the proper handling of SBA bond proceeds.
- Assist the staff in computer problem resolution including hardware and software issues including contacting the Office of Technology, when appropriate, for assistance.
- Attend various conferences and training sessions to keep up to date with requirements for purchasing and payment processing.
- Compile data regarding the SBA payroll and budget functions as needed for the Executive Director for external reporting requirements.
- Problem solve and provide creative solutions for problems arising in the operations of the SBA.
- Review federal and state legislation and assist the Executive Director in policy interpretation and implementation plans.
- Handle special project requests as needed by the Executive Director.
- Assist the Executive Director and department heads with annual employee evaluations.

## **QUALIFICATIONS:**

### **Required:**

- A minimum of five years experience in working with state government finance and budgeting procedures.
- A working knowledge of PC software including spreadsheets and data management functions.
- A working knowledge of the operations of state and federal government and experience with state purchasing procedures.
- A working knowledge of finance and budgeting.

### **Desired:**

- A degree in business administration with a general knowledge of finance and budgeting.
- A working knowledge of current state financial software.

## **DIRECTOR OF FINANCE**

### **NATURE OF WORK:**

Under the general supervision of the Executive Director, the Director of Finance performs professional and administrative work in directing the financial and fiscal management of the School Building Authority. This individual is responsible for development and operation of the accounting and internal control systems for the administrative budget, for the investment of agency funds and for the construction budgets of the individual county boards of education.

The Director of Finance will be responsible for the development of short-term and long-term strategies to ensure the fiscal solvency of the agency and working with the state's financial advisor as it relates to the use of the agency's revenue stream over the next twenty years. The Director of Finance will work with the Director of School Planning and Construction and the architectural staff during the construction phase of projects to ensure that the selected projects are constructed within the prescribed guidelines and within the approved construction budget. The Director of Finance will provide assistance to the Director of Administration relating to the daily operation and the internal control over the School Building Authority's funds. This individual will act as a liaison between the agency and the financial services industry.

### **EXPECTATIONS:**

- The staff member works effectively as a member of the administrative team and is responsible for the Finance Division of the School Building Authority.
- The staff member demonstrates self-control and exhibits an attitude of mutual respect.
- The staff member maintains and creates new policy and procedures of all financial and control functions to safeguard the assets of the School Building Authority and presents recommendations to the Executive Director and to the members of the Board.
- The staff member is ethical and demonstrates good work habits.
- The staff member demonstrates an ability to work with local county boards of education personnel, School Building Authority members and legislative leaders.

### **PROFESSIONAL DUTIES:**

- Develops and executes comprehensive policy and fiscal control methods and procedures for the School Building Authority for the School Construction Fund, School Major Improvement Fund, School Access Safety Fund, Emergency Fund and any Federal Funds that are received for the construction or major improvement of school facilities.
- Directs agency-wide programs encompassing the full range of budget and financial management activities for all of the individual county boards of education in the construction or renovation of public school buildings financed with state funds that include monthly audits of requisition requests submitted by the county boards of education, the comparison of the construction budget to the actual results and initiates any required budget adjustments with the local county boards of education and the

monthly processing of the actual payments to the county boards of education for eligible construction costs.

- Provides direct managerial oversight and serves as the fiscal agent of school construction projects for the county school systems that control has been taken over by the State Department of Education.
- Coordinates monthly project pay applications with the Planning and Construction Services staff.
- Acts as a key policy advisor to the Executive Director and appointed Board members of the School Building Authority in the management planning, policy development and decision making relating to cash flow requirements and the investment of the construction and debt service funds in order to assure liquidity and safety of principal.
- Coordinates the monthly preparation of the data for the annual audited financial statements that include a management discussion and analysis of the School Building Authority's financial performance as required by the State of West Virginia and the Bond Indentures.
- Works with the State of West Virginia's financial advisor on complex and long range financial issues of the School Building Authority for recommendation to the Governor, which includes sales of bonds from dedicated revenue sources of the State Lottery, presentations to nation rating agencies in the issuance of bonds and the preparation of revenue projections with multiple variable in order to assure the adequacy of available fiscal resources to meet long term needs.
- Serves as a member of committees formed to evaluate the proposals received for underwriting services for state agencies from national financial institutions when requested by the Secretary of Administration.
- Prepares and maintains the annual budgets of the School Building Authority that includes the revenues and payments for the construction program, the debt service on outstanding bonds and administrative operations.

## **QUALIFICATIONS:**

### **Required:**

- A Bachelor's degree in accounting, finance or related field with eight years' experience in the finance and construction industries; or a Master's degree in accounting, finance or related field with five years' experience at a management level.
- A working knowledge of PC software, communications and operations relating to accounting and maintenance of financial records.
- Clear and effective oral and written communication skills.

### **Desired:**

- Certified Public Accountant with five years of auditing experience.
- Three years' experience preferably in a local county board of education setting as a treasurer or a business manager.

- Certified as a West Virginia School Business Official and familiar with the current handbook.
- A working knowledge of West Virginia State Code (Section §18-9D) as it relates to the construction and renovation of school facilities.

## **FINANCIAL ASSISTANT**

### **NATURE OF WORK:**

Under the general supervision of the Director of Finance and the Director of Administration, the employee will perform advanced technical work in the area of finance and administration. Under limited supervision, the employee will be responsible for providing both clerical and administrative functions. Work will involve the ability to work independently with limited supervision. Work must be provided in strict confidence and in accordance with modern professional administrative principles. In addition, the employee will work on an as-needed basis with the Architectural Division and the Executive Director of the SBA.

### **EXPECTATIONS:**

- Work effectively as a member on an organizational team.
- Demonstrate self-control and exhibit an attitude of mutual respect.
- Demonstrate ethical behavior and good work habits.
- Demonstrate an ability to communicate effectively with county personnel and the general public.

### **PROFESSIONAL DUTIES:**

- Maintain all in-house SBA financial reports.
- Establish and maintain a filing system for all financial reports received from various sources including the State Treasurer's Office.
- Maintain all original SBA Grant Contracts.
- Prepare draft correspondence and Grant Contracts needed as a result of project awards.
- Work with the Director of Finance to prepare the Monthly Requisition Payment correspondence for the Trustee and County Superintendents.
- Review and certify all incoming invoices and prepare for payment including the resolution of any errors.
- Contact vendors, prepare purchase orders, maintenance contract and related purchasing documents under the direction of the Director of Administration.
- Monitor all recurring expenses ensuring proper billing and timely invoice receipt.
- Maintain an up-to-date inventory physical inventory of all supplies, furniture and equipment.
- Assimilate and distribute finance related information to various state agencies and vendors.
- Compose routine letters and compile factual reports which require the exercise of judgment and originality.
- Maintain a calendar of activities, appointments and scheduled leave time for the Finance Division.
- Maintain a schedule of all required financial activities including budget documents, debt service and other financial reports and notify the responsible Finance staff member.
- Assist in the handling of in-coming and out-going phone calls.
- Create documents in Microsoft Office and its related software.
- Learn the major responsibilities of other support personnel and provide assistance during absences or times of a heavy workload.



## **QUALIFICATIONS:**

### **Required:**

- High school diploma or equivalent which includes or is supplemented by a course in bookkeeping/accounting.
- Five years of full-time paid employment in accounting, bookkeeping, purchasing or related work.
- Typing at 55 wpm.
- Good oral and written communication skills.
- Good mathematics and keyboard skills.
- Ability to work under pressure and tight time lines.
- Ability to perform multiple assignments.
- Willingness to work occasional overtime.
- Willingness to share work load of others during peak times.
- Demonstrate exceptional work habits and attendance record.
- Strong sense of cooperation and hospitality.

### **Desired:**

- Advanced training in a job related field.

## **EXECUTIVE SECRETARY**

**ADMINISTRATIVE UNIT:** School Building Authority of WV

### **NATURE OF WORK:**

Under limited supervision, performs highly responsible advanced level administrative support work for the Executive Director. Work involves independent responsibility for making limited policy interpretations in dealing with the public and acting with authority on office management and administrative functions in the absence of the supervisor. Responsibilities include high level secretarial, clerical, office management and general administrative duties with primary emphasis on relieving the supervisor of administrative details. Work is performed in strict confidence and in accordance with modern professional secretarial principles and techniques. Supervision may be exercised over subordinate office clerical personnel for work assignments relating to the Executive Secretary's assigned duties.

### **DUTIES:**

- Perform administrative tasks for the Executive Director such as but not limited to: organizing appointment calendar, screen visitors and telephone calls; make travel arrangements, answer routine correspondence, accumulate information for reply to request by correspondence
- Assist office staff with answering the phone, receive all mail/deliveries and distribute
- Take dictation of confidential and technical information from Executive Director and/or transcribe from transcribing machine
- Type correspondence, reports, forms, contracts, bulletins, manuals, narratives and documents which may require a familiarity with terminology relating to building design and/or construction terms
- Independently composes and type correspondence for the Executive Director from general instructions or marginal notes
- Gather and compute information for the Executive Director on special assignments, such as Legislative Reports, budgets and speeches
- Direct responsibility for the compilation and coordination of all Quarterly and Special Authority Meetings
- Schedule Board Meetings and Conferences; contact Board Members and others participating to set date and time, reserve meeting facility, transportation for guests and/or speakers, take notes of meetings and complete minutes and distribute to appropriate Authority Members
- Maintain and organize office files; assure proper security measures are followed concerning confidential files and materials; maintain Executive Director's manuals, regulations, staffing patterns etc.
- Assist Executive Director in the planning and analyzing of office problems affecting operations; advise the Executive Director of current situation and problems and makes recommendation of possible solutions
- Assists the School Planning and Construction Staff with the coordination of in-house planning and construction services duties

## **EXPECTATIONS**

- Knowledge of modern office procedures, practices and equipment
- Working knowledge of Microsoft Office – Word, Excel, Power Point and Outlook
- Knowledge of Agency Rules, Regulations and Procedures
- Maintain detailed records according to a prescribed format
- Retrieve and utilize information from multiple sources to complete assignments
- Compose correspondence dealing with routine inquiries regarding the services or procedures of the organization
- Plan, schedule assignments and work as a member of an administrative team as well as coordinate and review work of other employees
- Take efficient meeting minutes as well as transcribe the minutes and distribute
- Demonstrate the ability to work with the public in an effective and courteous manner and to maintain effective working relationships with superiors, subordinates, associates and others as well as the general public
- Demonstrate the ability to analyze operational procedures, compile a report of information gathered and recommend for review by the Executive Director and staff
- Demonstrate the knowledge of WVBOE and SBA CEFPA Amendment requirements, the long range planning process

## **QUALIFICATIONS**

- High School diploma or equivalent
- 10 years of full-time or equivalent part-time paid secretarial experience, two years of which must include administrative support or complex clerical duties
- Full –time study in an accredited college or university, related business or vocational school may be substituted through an established formula for the required experience outside the area of assignment
- Strong oral and written communications skills
- Dependability and personal initiative
- Ability to work under pressure and tight time lines
- Ability to organize and perform multiple assignments
- Strong sense of cooperation and hospitality

## **PREFERRED**

- Experience as an Executive Secretary
- Experience working with Legislative issues
- Experience with County and/or State Government operations